Automated Case Directory – Reports Demo
IMAC IT Subcommittee Meeting
August 14, 2003

Over the last few weeks, DHFS and DWD staff have been meeting to define specific report criteria for the Automated Case Directory, ensuring that there is at least one report that answers each of the business questions that have been defined. We've defined a number of reports that we think will be quite useful, but in doing so we've made a few decisions based on our best assumptions of how you would like to have the reports function. Today we'll be showing you some of these reports and hope to get feedback that will help us finalize the first series of reports to be produced.

For each report, we've tried to determine the following things:

(1) Grain, i.e., the level at which the report is run (e.g., Case, Case Individual, AG, AG Individual)
(2) Which elements to build into the prompt.
(3) Which level(s) of geography to use in the report.
(4) Which elements to have appear in the report.
(5) Which elements to have reports break on, which should result in page breaks, and which should appear on each page.
(6) Which break elements should appear in the index (if any).
(7) Which style of report to use (table, form, crosstab).
(8) What sort orders should be used in the report.
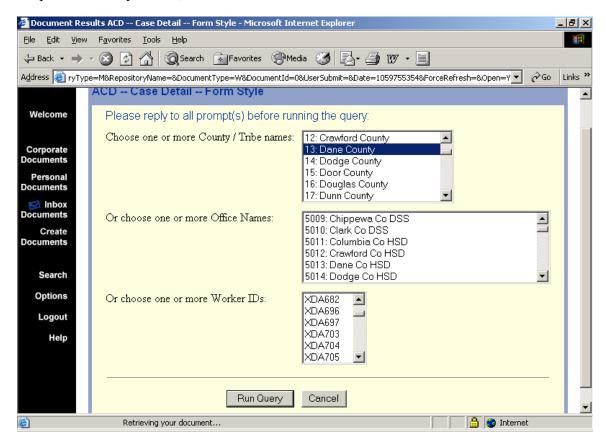(9) What should appear in the title, header, footer.

Things to keep in mind when reviewing these reports:

(1) Column widths will vary depending on the data within them.
(2) Printing is reliant on browser print functionality.
(3) Viewer-level users cannot alter title, sort order, or any other aspects of the report. (Interactive-level users can do this).
(4) After running a prompted report, a user can save that specific report in their personal directory.
(5) Users will have the capacity to export data in the report to an Excel spreadsheet

The following pages will show details and questions about the base reports that we will be showing you today. We plan to use these reports as the foundation of all other reports developed in the first release of the ACD application.

Prompts:

Prior to running the report query, prompts will appear that allow users to limit the report to specific County/Tribes, Offices or Worker IDs.
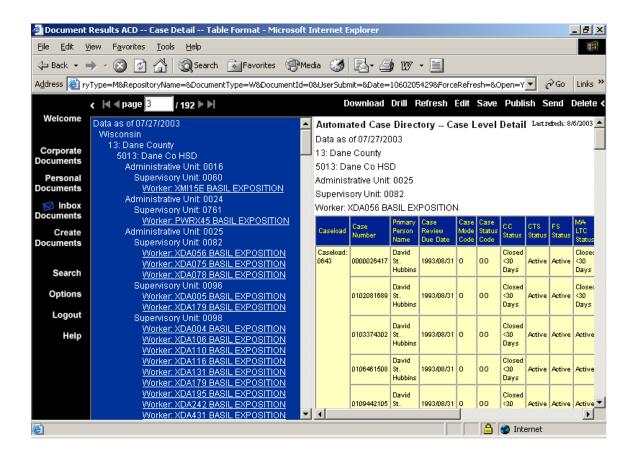

Questions:

1) Are there any additional data elements you want reports to be prompted on (e.g., Milwaukee Region)?

Indexes

Indexes (shown on the left) can be included to allow easier navigation through multi-page reports. Users can use their mouse to minimize the size of the index portion of the screen and allow more of the actual report to be visible.
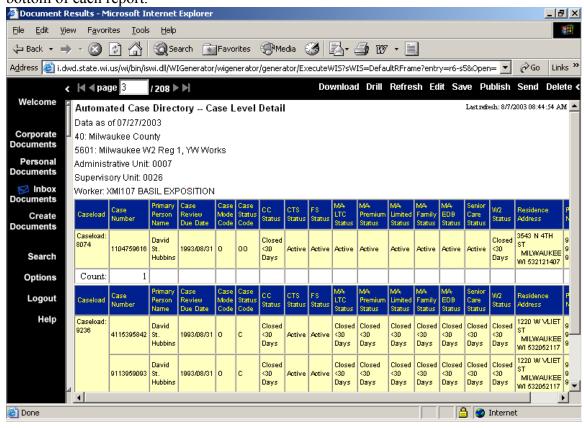

Questions:

1) Do you want indexes to be available in the reports?

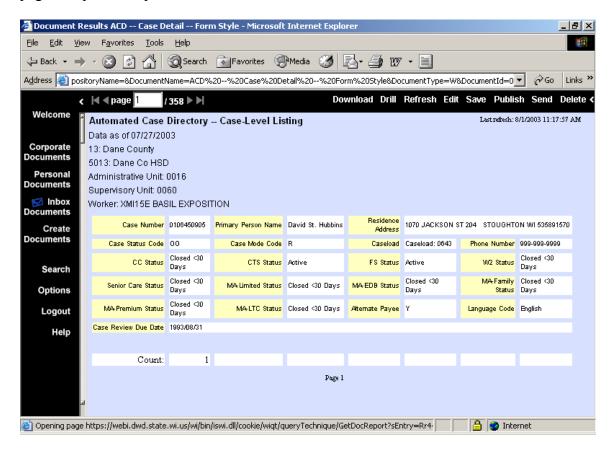# Report #1A – Case Level Detail Report (Table Format)

This report shows one row per case, with page breaks by worker, and cases grouped by caseload within the worker's listing. Drop-down boxes at the top of the report allow users to filer the query to any specific value for a given field on the report, e.g., if a user wants to see only cases where the FS Status = 'Active', they can select that value from a drop-down box at the top of the screen. Sums by caseload and worker appear at the bottom of each report.

Questions:

1) Is this how you would like to see this report broken down?
2) There is a data element that stores the specific Milwaukee Region Name and Number. Would you like this element as a prompt or a page break?
3) The worker displayed in this report is the Primary Worker. How would you like us to handle FEPs and Case Managers?
4) The possible values for each program are as follows: Currently Open, Open in Future, Closed <30 Days, Pending and Not Active. For these reports do you want these participation types grouped in some other way (e.g., Currently Open/Not Currently Open or Active/Not Active)?
5) Do you want the report sorted by Case Number, Primary Person Name, or some other way?

Report #1B – Case Level Detail Report (Form Layout)

This report is very similar to the first report, but rather than showing one row per case, data elements are grouped into a "block" of data for each case. This allows for more data elements to be displayed per case, but fewer cases will appear on each screen or each page of a printed report.
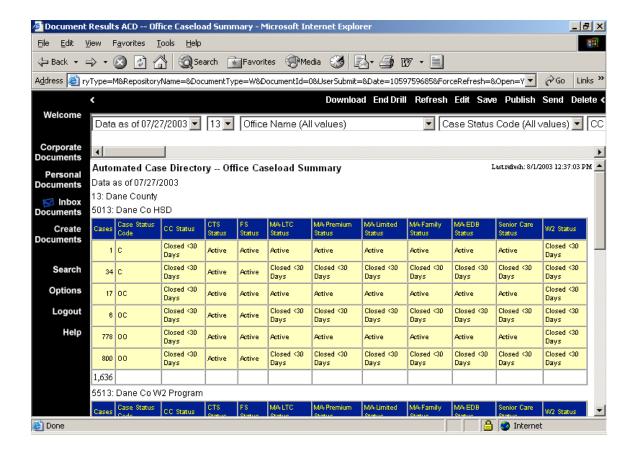

Questions:

(1) Do you prefer this format to the Table format?
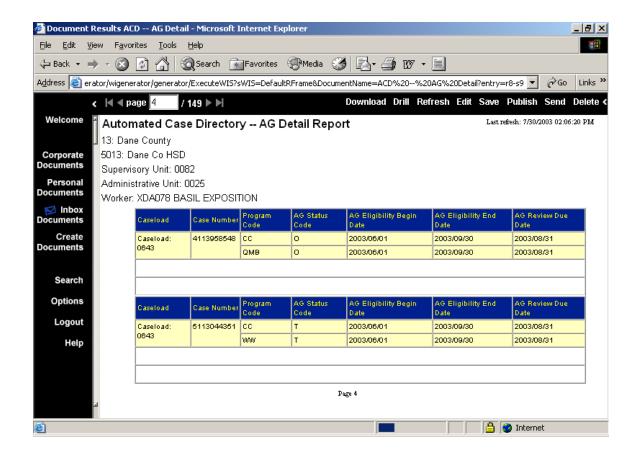
Report #2 – Office Caseload Summary

This report provides summary reports for each office. Unlike other reports, the prompt does *not* include Worker ID, as the intent is for this to be an office-level summary. There is one row in the report for each combination of activity in each program or subprogram group.

Questions:

(1) Should there be additional reports providing summaries at different levels?
(2) The possible values for each program are as follows: Currently Open, Open in Future, Closed <30 Days, Pending and Not Active. For these reports do you want these participation types grouped in some other way?
(3) Do you want to be able to "drill-down" to see the specific case numbers that make up each of the counts (this may be best done in a separate report)?
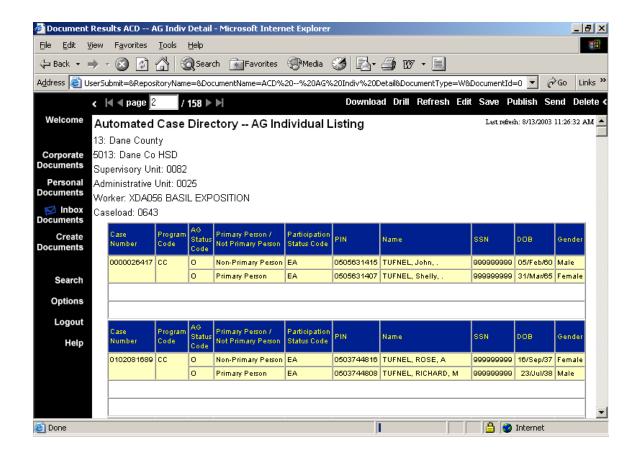
Report #3 – AG Detail Report

This report show one row per AG per case, with AG-specific information (eligibility dates, review dates).

Questions:

1) Do you want to see a report that contains AG information without any Individual information?
2) Are there any other AG-specific data elements you would like to see on this report?
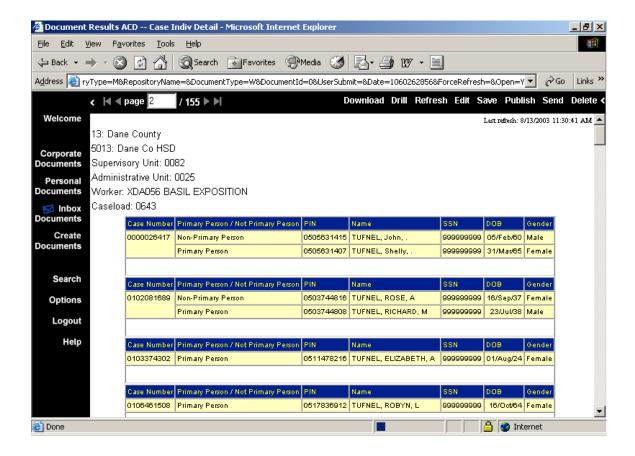
Report #4 – AG Individual Detail

This report contains one row per individual per AG. This means that individual information will be duplicated for each AG in the case. This report has been the basis for many of the other data-specific reports we are creating.

Questions:

(1) What other AG-Individual-specific data elements would you like to see on this report?
(2) Do you want the report sorted by Case Number, Primary Person Name, or some other way?

Report #6 – Case Individual Detail Report

This report shows individual information without AG information. The advantage is that each individual in a case only appears once per case listing; the drawback is that there is no information pertaining to the AGs the individuals are active in.

Questions:

(1) Is there likely to be a need for a case-individual listing?
(2) Do you want the report sorted by Case Number, Primary Person Name, or some other way?